

***eOPF***

**Electronic Official  
Personnel Folder**

**NOAA Human Resources  
Training Guide  
January 2006**

# **eOPF HR SPECIALIST TRAINING GUIDE**

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# **Part I – Basic User Functions**

## **Chapter 1: Introduction to eOPF**

OPM is changing the way agencies maintain and access official personnel folders. Human Resources offices across the country are changing from a paper-based personnel records system to an electronic OPF management system. In the coming months, our current OPF's will be uploaded into the new, web-enabled Electronic Official Personnel Folder (eOPF) solution.

The eOPF solution is designed to electronically store, manage, and distribute OPF documents. eOPF stores all OPF documents in portable document format (PDF) files. Every employee will be able to access his or her own OPF at any time and any place where they can access the internet.

This training session is designed to introduce you to the eOPF solution and to familiarize you with the eOPF functionalities. In this class we will be concerned with HR Specialists and Assistants accessing their own eOPF as well as the eOPFs of their serviced employees.

## **Chapter 2: Getting Started with eOPF**

Before using eOPF, you must first login. Logging in requires a valid user name and password. User accounts will be set up for all current employees when we first deploy eOPF by the use of a PDF Welcome Letter attached to an email sent to each employee's work email address. The employee will use the system generated user ID and the self service "Forgot Password" function to request an initial password. eOPF will generate an email assigning a new password. To access the eOPF system, each employee must change the password to a DOC compliant password.

**NOTE:** user ID's and passwords are both case-sensitive. If your logon attempt fails, you will need to wait for one minute before your next attempt. Typically, after three (3) consecutive failed attempts to log in to eOPF, that user account will be "locked out" as a security precaution. eOPF administrators must reset the user account after the allowed number of failed logon attempts.

As with all DOC and NOAA passwords, you must remember to safeguard your user ID and password. Some basic guidelines for maintaining your password are as follows:

- Do not share your password with anyone
- Do not let anyone logon with your eOPF user ID or password because eOPF logs and tracks all actions to the user ID.

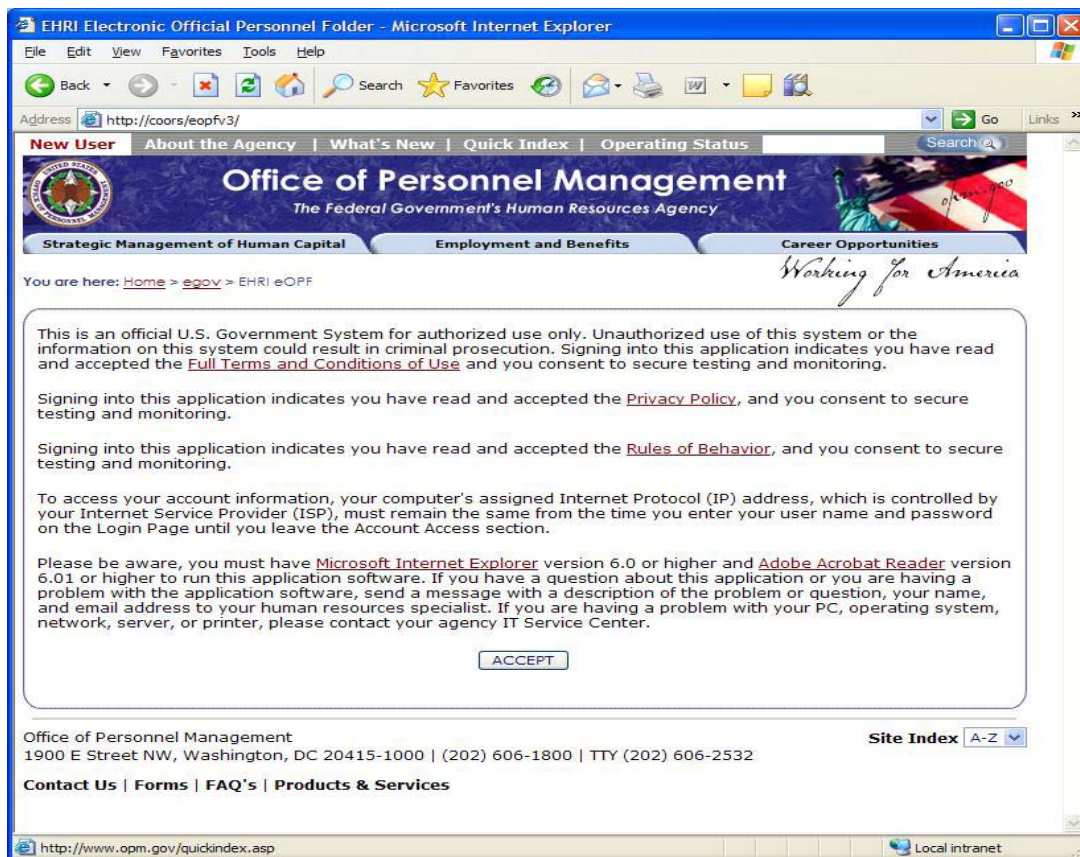
## **Logging on to eOPF**

You must log on to the eOPF each time you want to access the system. After you log on to eOPF, you can change your password.

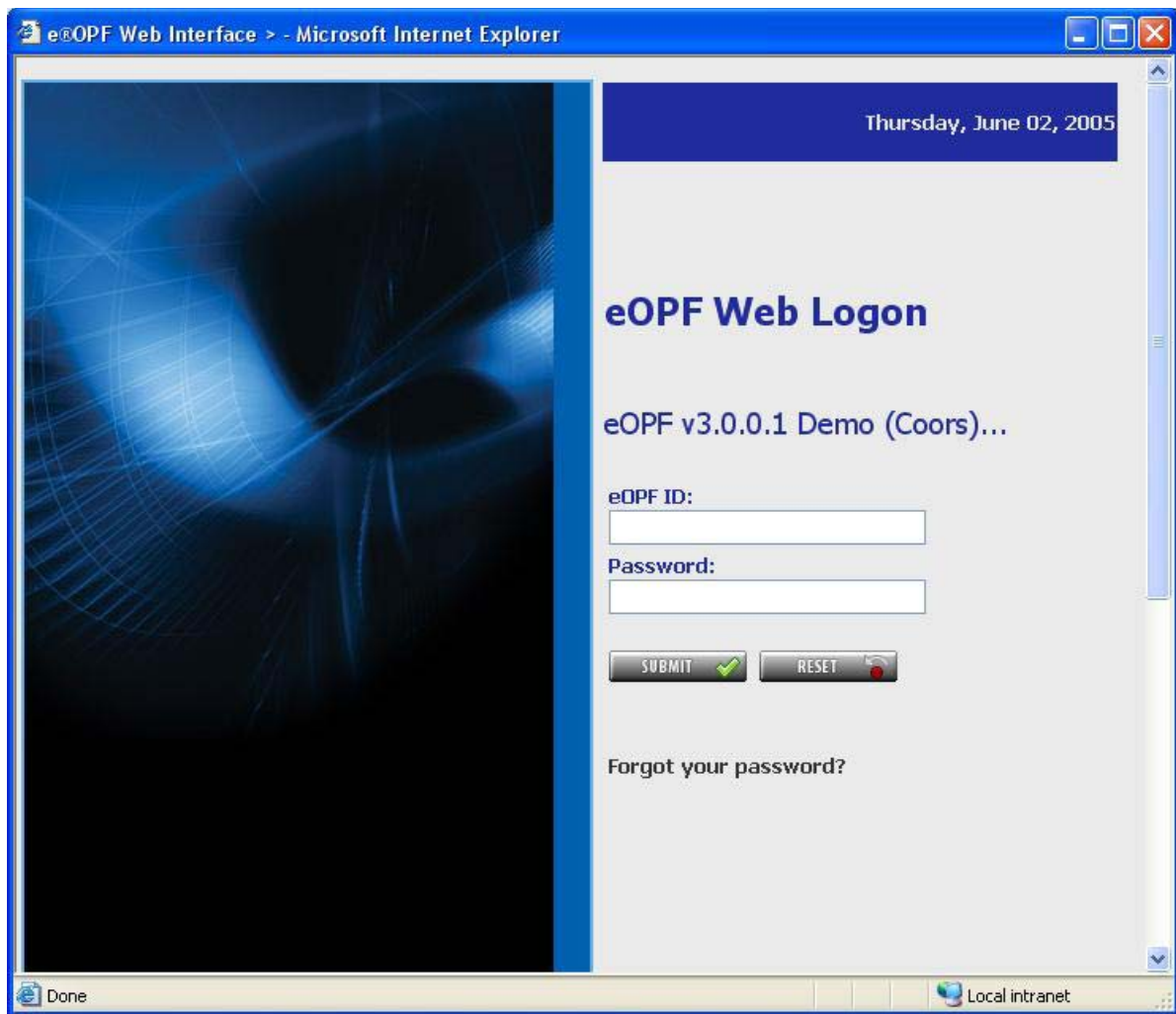
### **To Log on to eOPF:**

1. Launch your Internet browser.
2. Maximize the browser to utilize the entire page.
3. Type the designated Address for **eOPF**:

The **eOPF User Agreement** page appears.




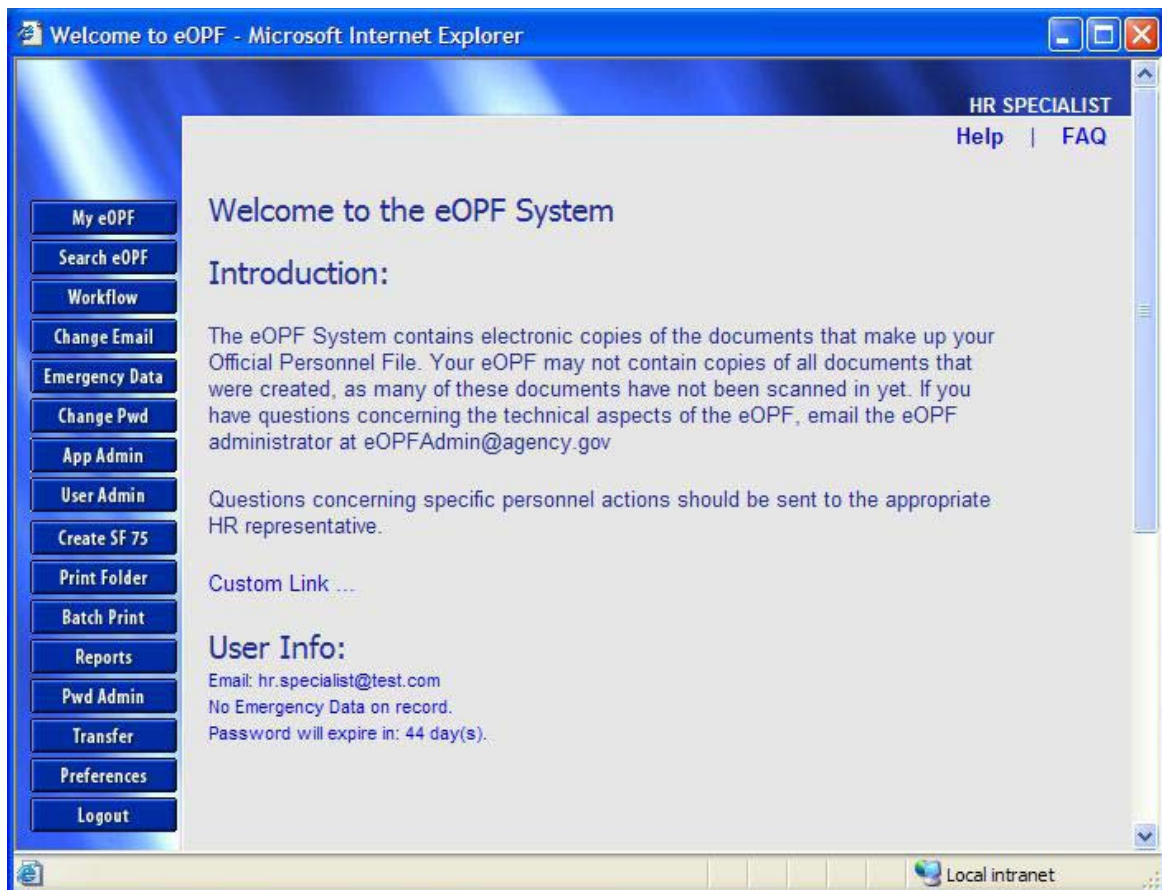
4. Click the  **Accept** button, after reading the **User Agreement statement**. The **eOPF Web Logon** page appears.



5. Type your eOPF ID in the **eOPF ID** field.

6. Type your Password in the **Password** field.

7. Click the  **Submit** button. The **eOPF Welcome** page appears.



## Using the Main Menu Buttons

The eOPF main menu buttons display in the left hand margin of your eOPF pages.

### Note:

The main menu options may appear slightly different from the example above. The main menu buttons vary depending on the eOPF group functional access that has been granted to you by the eOPF administrator.

## Managing Your eOPF Password

### Password Policies

eOPF gives you the ability to change your password at any time. For example, your password may have been compromised, or you may wish to change it to something more easily remembered.

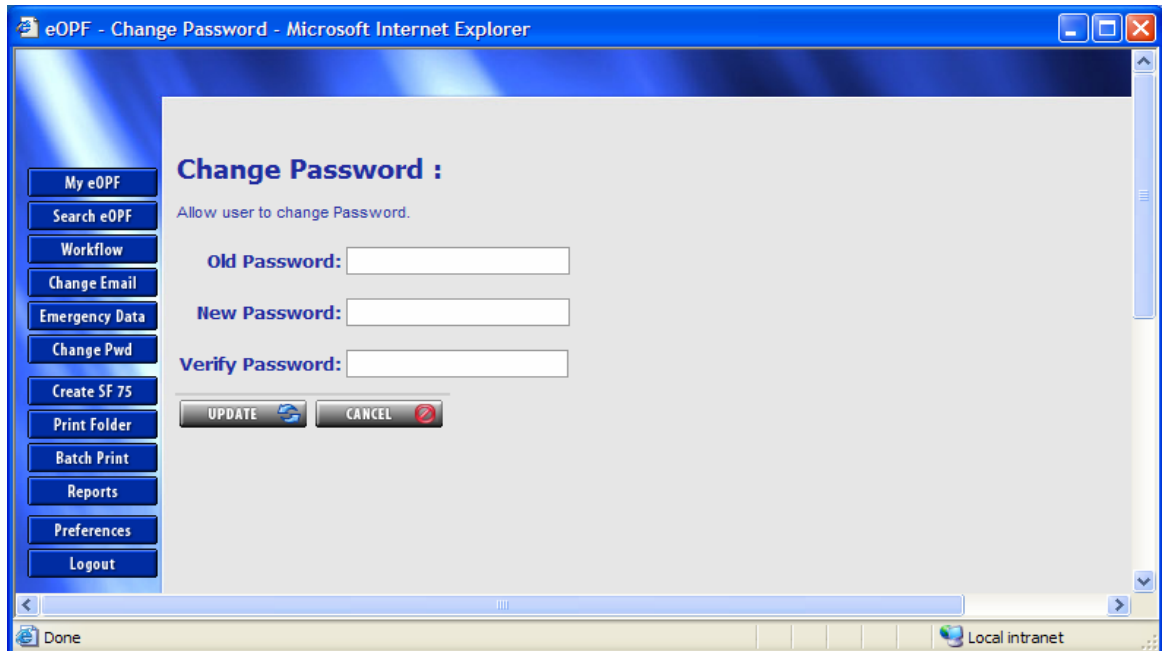
Your new password must adhere to the requirements defined by DOC. The eOPF administrator can configure the password requirement settings such as a 90-day expiration date.

### To Change Your Password:

1. From the **eOPF Welcome** page, click the **Change Pwd** button on the main menu bar.



The **Change Password** page displays.

A screenshot of a web browser window titled "eOPF - Change Password - Microsoft Internet Explorer". The browser shows a web page with a blue header and a left sidebar containing a menu of buttons: "My eOPF", "Search eOPF", "Workflow", "Change Email", "Emergency Data", "Change Pwd", "Create SF 75", "Print Folder", "Batch Print", "Reports", "Preferences", and "Logout". The "Change Pwd" button is highlighted. The main content area is titled "Change Password :" and includes the text "Allow user to change Password." Below this are three input fields: "Old Password:", "New Password:", and "Verify Password:". At the bottom of the form are two buttons: "UPDATE" (with a blue circular arrow icon) and "CANCEL" (with a red circle and slash icon). The browser's status bar at the bottom shows "Done" and "Local intranet".

2. Enter your current password in the **Old Password** field.
  3. In the **New Password** field, enter your new password.
  4. In the **Verify Password** field, enter your new password again.
  5. Click the **UPDATE** button.
  6. For this training, we will not be changing passwords.
- Click the **CANCEL** button to cancel the password change.




### Changing Your E-Mail Address

The eOPF solution notifies users via e-mail when new eOPF documents are added to their file; therefore, if your e-mail address changes it is important that you update it in the system. eOPF allows all users to change their e-mail address.

### To Change Your E-Mail Address:

1. Click the **Change Email** button. The **Email Address** page appears.

2. Type your e-mail address in the **Your Email Address** field.
3. Click the  **Update** button.

The **eOPF Welcome** page appears with the updated e-mail address displayed.


## Viewing and Updating Emergency Data

eOPF allows you to enter emergency contact information. This information is available to your supervisor and/or HR personnel for emergency use only.

### To View and Update Emergency Data:

1. Click the **Emergency Data** button from the main menu.

The **Emergency Contact Information** page appears.

2. Edit the desired fields and click the  **Apply** button. The **Emergency Contact Information** page reappears displaying the message "Emergency data updated successfully."

## Accessing Online Help

You can access eOPF online help by clicking on the **Help** link at the top of an eOPF Web page. From the **Help** page, you can jump to topics of interest.

## Accessing Frequently Asked Questions

The eOPF provides access to a **Frequently Asked Questions (FAQ)** page. The **FAQ** page can be accessed by clicking on the **FAQ** link provided at the top of all eOPF pages. Accessing the **FAQ** page allows access to current eOPF information. For example, the **FAQ** page may post information about:

- Frequently asked questions and answers

- What's new
- Discuss technical issues
- How to contact eOPF support; and
- General information about eOPF solution access

### **Logging out of eOPF**


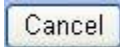
In order to ensure the security of the eOPF solution, remember to log out of the system when you are finished.

#### **Note:**

You will be automatically logged out of the eOPF system after the system is idle for 15 minutes. (This setting is configurable by the administrator.)

#### **To Log out of eOPF:**

1. Click the  **Logout** button.

2. Click the  **OK** button to logout of eOPF and automatically close the browser window. Click the  **Cancel** button to return to eOPF and continue working.

## Part II – HR Functions

### Chapter 3: Viewing eOPF Documents


eOPF organizes and manages personnel documents within an electronic folder. Every DOC employees has an eOPF with all of his or her personnel documents organized in the same manner as the traditional paper OPF.

Once logged into eOPF you can click on either the My eOPF button to access your OPF information or the Search eOPF button to locate files for your reporting employees.

#### Viewing Your Own eOPF


1. To view all contents of your eOPF in order by effective date, click on **My eOPF**. This will bring up your **Folder** page. Your name is displayed on the upper right corner of the page.



2. Open your eOPF by clicking on the  plus icon (located to the left of your last name on the **Folder** page). This displays the **Results List** page on which all the documents contained within your eOPF are displayed.



3. From the **Annotation** drop-down list, select whether to view the document with or without public annotations. The default is to "View documents with annotations". As an employee you have the right to view the public annotations in your folder.

4. Click the  **View Document** icon on the row of the document you wish to view. You will be prompted to open or save the document using Adobe reader.

**NOTE :**

Every time an eOPF document is viewed, that action is logged electronically.

Standard Form 52 Rev. 7/91 U.S. Office of Personnel Management FPM Supp. 296-33, Subch. 3		<b>REQUEST FOR PERSONNEL ACTION</b>	
<b>PART A - Requesting Office (Also complete Part B, Items 1, 7-22, 32, 33, 36, and 39.)</b>			
1. Actions Requested EOPF TEST1		2. Request Number EWP23093	
3. For Additional Information Call (Name and Telephone Number) EOPF TEST2		4. Proposed Effective Date 04/12/2002	
5. Action Requested By (Typed Name, Title, Signature, and Request Date)  EOPF TEST 11/28/2000		6. Action Authorized by (Typed Name, Title, Signature, and Concurrence Date)  EOPF TEST3	
<b>PART B - For Preparation of SF 50 (Use only codes in FPM Supplement 292-1. Show all dates in month-day-year order.)</b>			
1. Name (Last, First, Middle) Green, Beth		2. Social Security Number 111-11-1111	3. Date of Birth 03/12/1955
		4. Effective Date 03/11/2000	
<b>FIRST ACTION</b> 5-A. Code 5-B. Nature of Action 702 Promotion		<b>SECOND ACTION</b> 6-A. Code 6-B. Nature of Action 665 test	
5-C. Code 5-D. Legal Authority N6M Reg 335.102 Career Prom		6-C. Code 6-D. Legal Authority	
5-E. Code 5-F. Legal Authority		6-E. Code 6-F. Legal Authority	
7. FROM: Position Title and Number CONTRACT ADMINISTRATOR		15. TO: Position Title and Number CONTRACT ADMINISTRATOR	

## Searching for Specific Documents in your eOPF

You can search for and display specific documents in your eOPF using the Search eOPF function. This may be helpful if you are searching for a specific document type or documents created in a specified period of time. For more information on searching in your own OPF, see pages 18-23 in the eOPF User Guide for employees.

### Searching for an eOPF:

In eOPF, HR users can search and retrieve documents for an individual employee by entering the SSN, employee ID or the employee's name. HR users can refine the search with other parameters, such as document effective date or form type or name. A more expansive list of documents from multiple eOPFs can be retrieved by using search criteria such as the POI.

You can restrict your search for an eOPF folder by entering several criteria on the **Search Folders** page.

#### To search for an eOPF:


1. Click the **Search eOPF** button from the main menu. The **Search Folders** page opens.

This page allows you to query by such fields as SSN and Last Name.


2. Enter the search criteria for particular eOPF document(s).

#### Hints:

- ❖ Enter SSN with or without hyphens
- ❖ Use the Wild Card (will search on anything before or after % sign)
- ❖ **Include Empty Folders** allows you to list folders with no documents, such as those for new employees


3. Click the  Search button. The **Folder** page appears. On this example, the search may have been based on the POI (TEST).

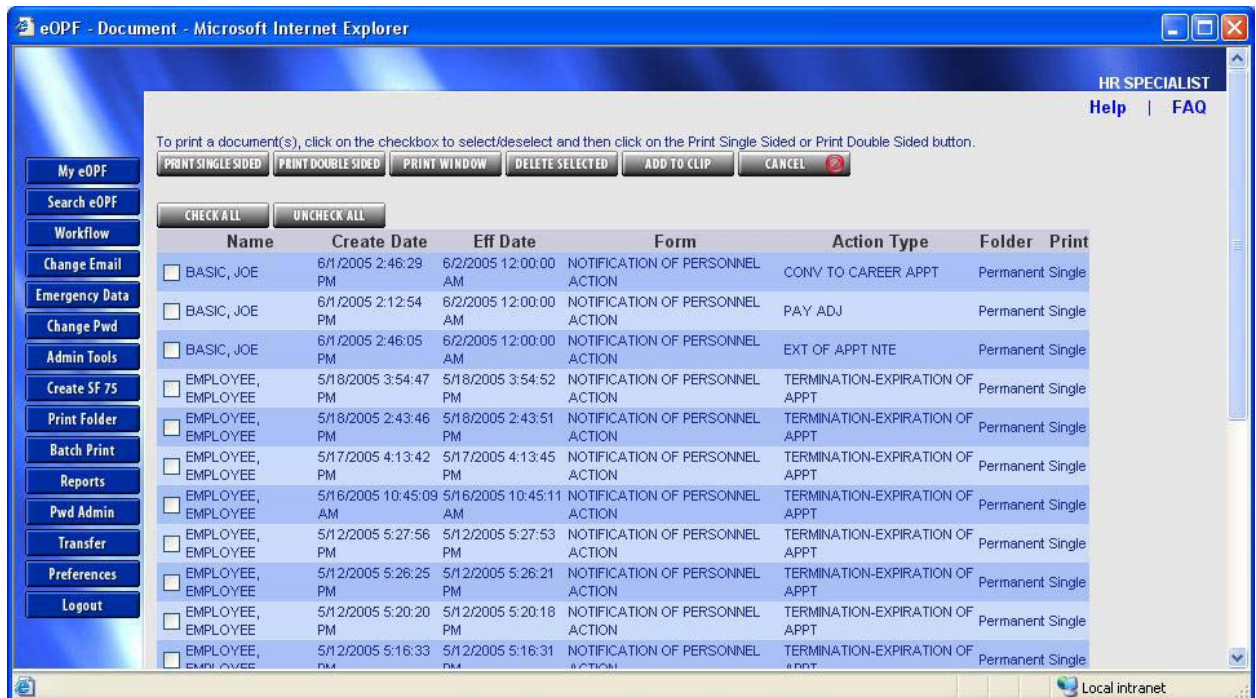


4. Select a folder by clicking on the  plus icon to the left of the last name of the employee folder you wish to see. The **Results List** page is displayed. Here we can see that Joe Basic was selected.



-OR-

Click the  **Show All Docs** button to list all documents that meet your search criteria. The **Show All Documents** page is displayed.



**NOTE:** Each time you view an eOPF document that is not your own, the action is logged electronically capturing your eOPF ID, date/time, and reason for viewing the document.

### To search folders by name:

1. On the **Search Folders** page, enter all or part of the **Last Name** and/or **First Name** and then click the **NAME SEARCH** button.

This figure shows search results from entering "L" in the **Last Name** field.

SELECT				
	SSN	Last Name	First Name	Org Code
<input type="radio"/>	000-00-1111	BASIC	JOE	01A


2. Select the Name of the employee by clicking on the radio button and then click the **SELECT** button.

The **Search** page is refreshed and the SSN, first name and last name fields are populated with the selected employee data.

3. Click the **SEARCH** button.

The **Folder** page appears.



- To view the contents of an eOPF, click the  plus icon to the left of the last name column to expand the folder contents.

The Results List displays for employee Joe Basic.




## Viewing an eOPF Document

After you locate an eOPF you can view and/or print a document(s) within the folder. NOTE: you must always first enter a reason for accessing the document. This information

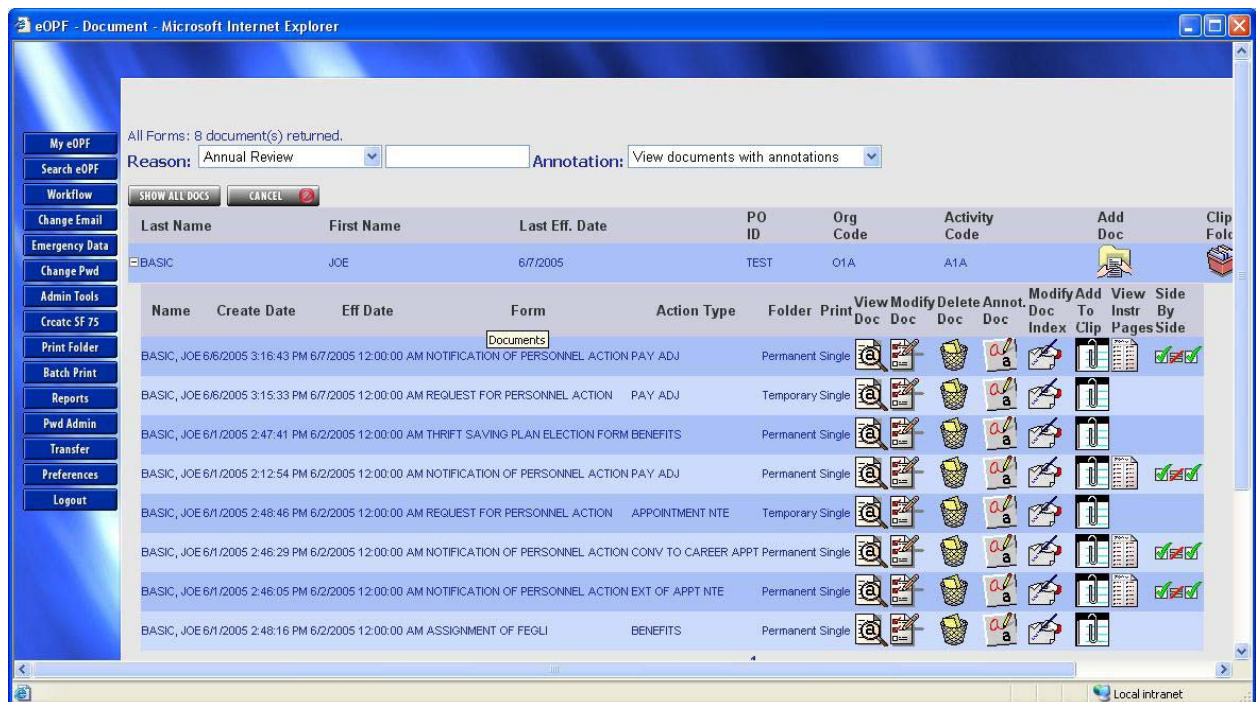
is recorded in the eOPF history and tracked for audit and reporting purposes.


### To View an eOPF Document:

1. Search for and locate the eOPF you wish to view. The **Folder** page appears.
2. From the **Folder** page, click the  plus icon to expand the folder.

The **Results List** page appears with a detailed view of the employee's folder.



This figure displays the **Results List** page for Joe Basic.



3. From the **Reason** drop-down list select a reason for viewing this document. If you select **Other** as the reason you must type an additional description in the field to the right of the drop-down list.
4. Select whether you want to include any public annotations from the **Annotation** option.
5. Find the document on the list that you want to view and click the  View Doc icon. This will open the document using Adobe Acrobat reader in a new window.

The following figure displays a sample document.


Standard Form 52 Rev. 7/91 U.S. Office of Personnel Management FPM Supp. 296-33, Subch. 3				<b>REQUEST FOR PERSONNEL ACTION</b>			
<b>PART A - Requesting Office (Also complete Part B, Items 1, 7-22, 32, 33, 36, and 39.)</b>						2. Request Number EWP23093	
1. Actions Requested EOPF TEST1						4. Proposed Effective Date 04/12/2002	
3. For Additional Information Call (Name and Telephone Number) EOPF TEST2							
5. Action Requested By (Typed Name, Title, Signature, and Request Date) EOPF TEST 11/28/2000				6. Action Authorized by (Typed Name, Title, Signature, and Concurrence Date) EOPF TEST3			
<b>PART B - For Preparation of SF 50 (Use only codes in FPM Supplement 292-1. Show all dates in month-day-year order.)</b>							
1. Name (Last, First, Middle) Green, Beth		2. Social Security Number 111-11-1111		3. Date of Birth 03/12/1955		4. Effective Date 03/11/2000	
<b>FIRST ACTION</b>				<b>SECOND ACTION</b>			
5-A. Code 702		5-B. Nature of Action Promotion		6-A. Code 665		6-B. Nature of Action test	
5-C. Code N6M		5-D. Legal Authority Reg 335.102 Career Prom		6-C. Code 665		6-D. Legal Authority test	
5-E. Code N6M		5-F. Legal Authority Reg 335.102 Career Prom		6-E. Code 665		6-F. Legal Authority test	
7. FROM: Position Title and Number CONTRACT ADMINISTRATOR				15. TO: Position Title and Number CONTRACT ADMINISTRATOR			

6. If the document contains multiple pages, use the **Next Page** and **Previous Page** buttons to navigate through the document.
7. When you finish, click the  **Close** button to close the window.
8. On the **Results List** page, click the  **Cancel** button to return to the search window or select a new document to view.

## Viewing eOPF Document Annotations


An annotation is a transparent layer of written comments placed on top of the document that may be used to highlight, markup or write comments. These layers can be public or private.

Documents in the eOPF can be viewed or printed in their original state, or with any annotations that have been added. Since annotations are added separately to each page of a document, you must navigate to each page to view the annotations for that page. To view document(s) with annotations:

1. After selecting **My eOPF** and expanding your folder by clicking on the  plus icon to the left of your last



name on the **Folder** page, locate the **eOPF** document you wish to view.

- The "View documents with annotations" is selected by default at the top of the display.

- Click  **View Doc** icon on the row of the document you want to view.

The document appears in the viewer.

Standard Form 52 Rev. 7/91 U.S. Office of Personnel Management FPM Supp. 296-33, Subch. 3				<b>REQUEST FOR PERSONNEL ACTION</b>			
<b>PART A - Requesting Office (Also complete Part B, Items 1, 7-22, 32, 33, 36, and 39.)</b>							
1. Actions Requested EOPF TEST1				2. Request Number EWP23093			
3. For Additional Information Call (Name and Telephone Number) EOPF TEST2				4. Proposed Effective Date 04/12/2002			
5. Action Requested By (Typed Name, Title, Signature, and Request Date) EOPF TEST 11/28/2000				6. Action Authorized by (Typed Name, Title, Signature, and Concurrence Date) EOPF TEST3			
<b>PART B - For Preparation of SF 50 (Use only codes in FPM Supplement 292-1. Show all dates in month-day-year order.)</b>							
1. Name (Last, First, Middle) Green, Beth		2. Social Security Number 111-11-1111		3. Date of Birth 03/12/1955		4. Effective Date 03/11/2000	
<b>FIRST ACTION</b>				<b>SECOND ACTION</b>			
5-A. Code 702		5-B. Nature of Action Promotion		6-A. Code 665		6-B. Nature of Action test	
5-C. Code N6M		5-D. Legal Authority Reg 335.102 Career Prom		6-C. Code N6M		6-D. Legal Authority Reg 335.102 Career Prom	
5-E. Code N6M		5-F. Legal Authority Reg 335.102 Career Prom		6-E. Code N6M		6-F. Legal Authority Reg 335.102 Career Prom	
7. FROM: Position Title and Number CONTRACT ADMINISTRATOR				15. TO: Position Title and Number CONTRACT ADMINISTRATOR			

4. Click on the **Next Page** and **Previous Page** buttons if there are 2 or more pages to view.
5. Click the  **Close** button to close the viewer.
6. On the Results List page, click the  **Cancel** button to return to the search window or select a new document to view.


## Annotating an eOPF Document

eOPF has an annotation feature which allows specified HR staff to make notes on documents. These notes are preserved as a layer that sits on top of the original document. The document can then be viewed or printed with or without the annotations.

Annotations are added separately to each page of a document. eOPF annotations tools allow you to freehand draw, apply shapes, add text annotations, and use a highlighter.

NOTE: there are two classifications of an annotation: public and private. If you designate an annotation as public, it can be viewed, edited, and deleted by anyone with view access in eOPF. Private annotations can be viewed and/or edited only by the user and HR staff. eOPF does not allow anyone to annotate their own documents.

### To annotate a page in an eOPF document:

1. Search for and open the desired eOPF document.
2. From the **Reason** drop-down list, select a reason for viewing the document.
3. Click the  **Annotate Doc** icon.

The following figure displays the **ActiveView** page.

**eOPF ActiveView**

New... Delete... Cancel Done Exit First Previous Next Last

**Life Insurance Election**  
Federal Employees' Group Life Insurance Program  
The Privacy Act Statement is on page 1 of this form.

**1 General Instructions**  
By law, unless you have all coverage or are ineligible, you are automatically covered for Basic Life Insurance on an individual basis. You may (1) elect to remain covered for Basic Life Insurance, (2) elect to remain covered for all of the options, or (3) elect to remain covered for all of the insurance coverage. If you are changing a previous election, see the back of Part 5 - Employee Copy.

**2 If you have elected to remain covered for Basic Life Insurance, you must also elect to remain covered for all of the options, or (3) elect to remain covered for all of the insurance coverage.**

**3 To elect to remain covered for Basic Life Insurance, you must also elect to remain covered for all of the options, or (3) elect to remain covered for all of the insurance coverage.**

**4 To elect to remain covered for Basic Life Insurance, you must also elect to remain covered for all of the options, or (3) elect to remain covered for all of the insurance coverage.**

**5 To elect to remain covered for Basic Life Insurance, you must also elect to remain covered for all of the options, or (3) elect to remain covered for all of the insurance coverage.**

**6 Agency Information**

U.S. Office of Personnel Management  
Federal Employees' Group Life Insurance Handbook (01-20-04)

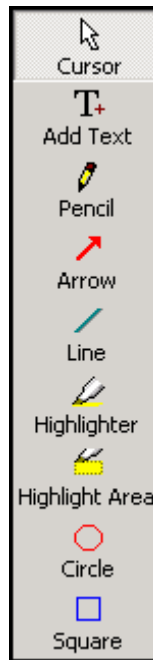
- Click the **New** button.  
The Private Annotation pop-up box appears.

**eOPF AVI**

Will this annotation be private?

Yes No

- Select the **Yes** or **No** button. The **ActiveView** page reappears.
- Select the annotation type from the tool list:



7. On the page, use your mouse to add the desired annotation(s).
8. When finished adding annotations, click the **Done** button. If you are done using the annotation feature, click the **Exit** button to close the document view window.


For information on removing an Annotation from a Document, refer to pages 55-56 in the eOPF HR User Guide.

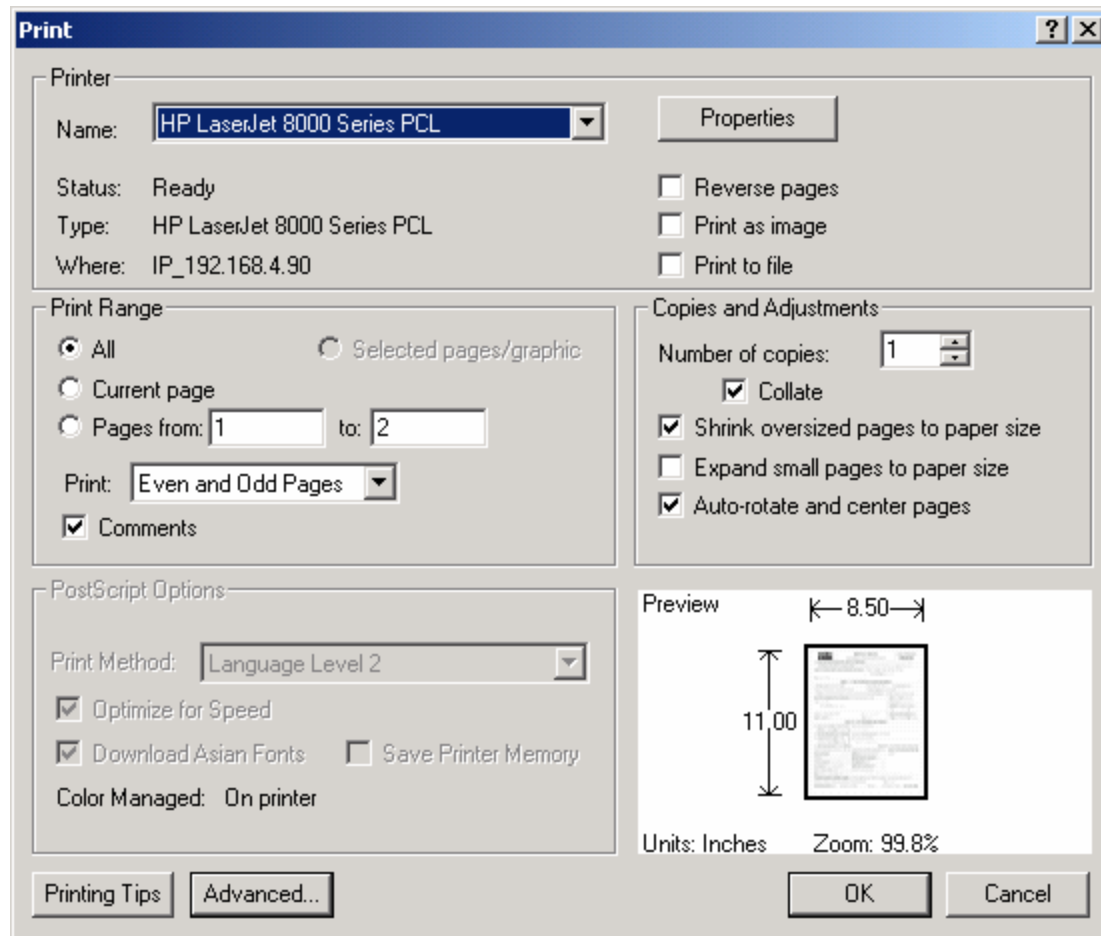
## Chapter 4: Printing eOPF Documents


Although eOPF is designed as a paperless record, there may be times when a hard copy of an eOPF document is needed.

You may choose to print one or more of the eOPF documents. The **My eOPF** option allows you to print one document at a time from your own eOPF. The **Search eOPF** option allows you to print multiple documents from your own or an employee's eOPF.

**Printing an eOPF Document using My eOPF:**

1. From My eOPF, locate the document you want to print.
2. Open the document using the  **View Doc** icon. The document opens in **eOPF Viewer**.
3. Click the **Print** button. The **Print Dialog** box opens.




4. Modify your printer settings and click the **OK** button.
5. Click the  **Close** button to close the document viewer.

## Printing eOPF Documents using Search eOPF

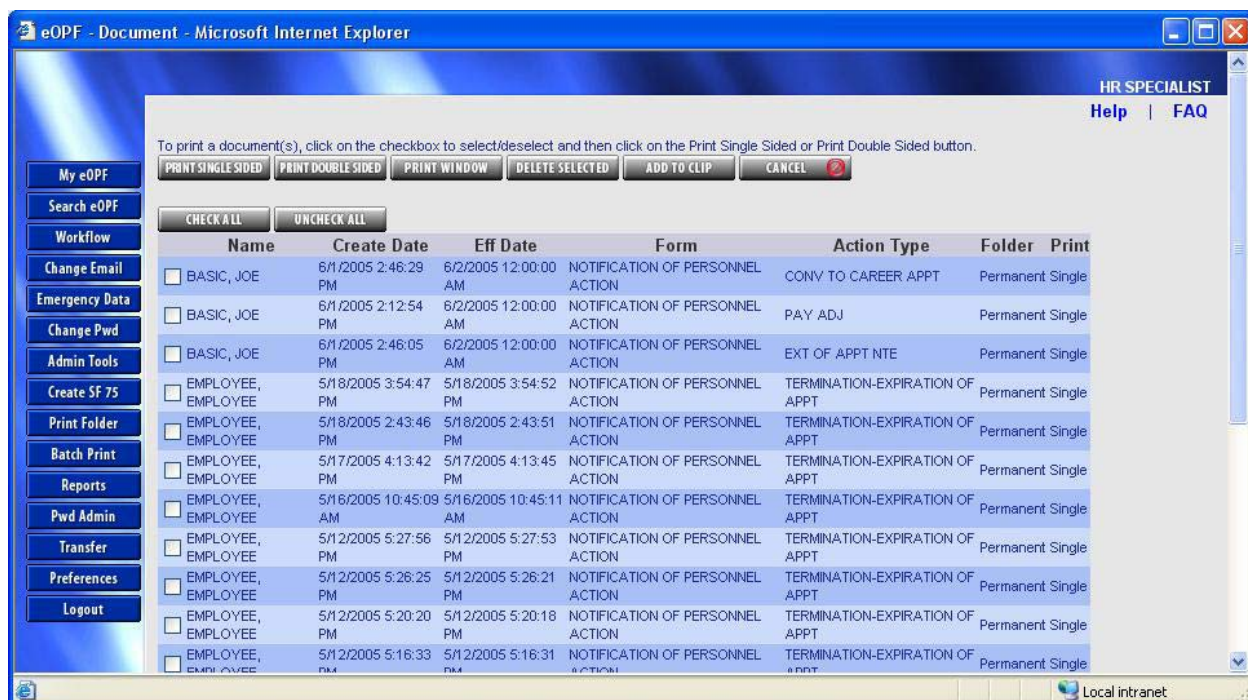
eOPF permits you to print documents based on a search query. You may print one or more documents directly from that list or you can print your results list.

### Printing directly from a Search Results page:

1. Search for and open the desired eOPF document. The **Folder** page displays.

- From the **Folder** page, click the  **Show All Docs** button.

The **Show All Documents** page appears.



- Click the check boxes of the documents you want to print, or click the **Check All** button to print them all. All selected documents are merged into one document displayed in the viewer.
- Click the desired Print button (Double Sided or Single Sided).
- If you want to print a copy of your Search Results page, click on the **Print Window** button from your **Show All Documents** page.

See your eOPF HR User Guide pages 71-79 for more information on printing from eOPF, such as printing an entire OPF.

## Chapter 5: Modifying Document Indexes

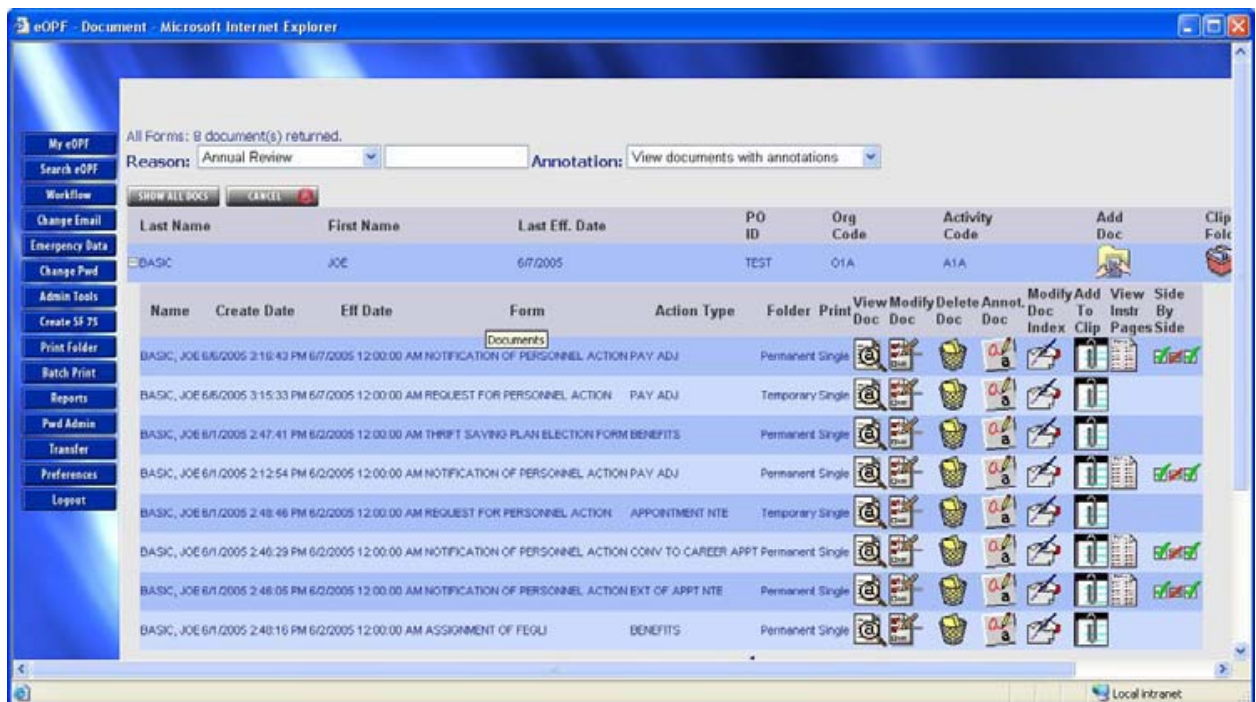
You modify a document index when you want to move a document to a different folder or folder section or correct information required for the index.


### Correcting a Filing Error


This function is used to move a misfiled document to another folder.

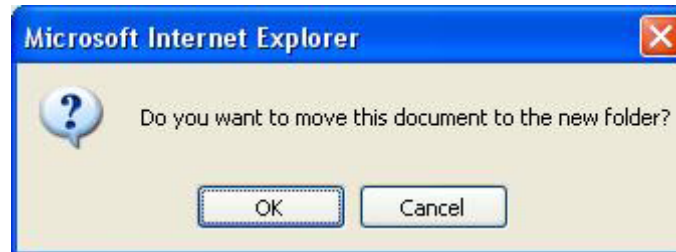
To Correct a Filing Error:


1. Search for and locate the eOPF document you wish to move to a different folder using the **Search Folders** page. The **Results List** page displays.



2. From the **Results List** page, select a reason from the Reason drop-down list.
3. Click the  **Modify Doc Index** icon associated with the document you wish to move. The **Modify Document Index** page appears.

4. Type the correct employee's SSN in the SSN field, and then click the  **Save** button. The **Move Document** confirmation box appears.



5. Click the  **OK** button. The **Results List** page reappears with the document moved to the correct folder.

For more information on **Modifying Document Indexes**, refer to pages 93-98 in your User Guide.

## Chapter 6: Working with eOPF Folders

Employee OPF documents can be accessed from a Results List and Show All Documents pages or through the use of paper clips.

### Working with Search Results Pages

When you elect to show all documents after performing a search, you see a list of documents matching your search criteria. A column in the results list indicates if the original document was single sided or double sided. You can print your search results list or print a document(s) from the list. See Lesson 4 of this guide for more information on printing eOPF documents. Additional information is available from Chapter 6 of the User Guide.


### Working with Paper Clips in eOPF

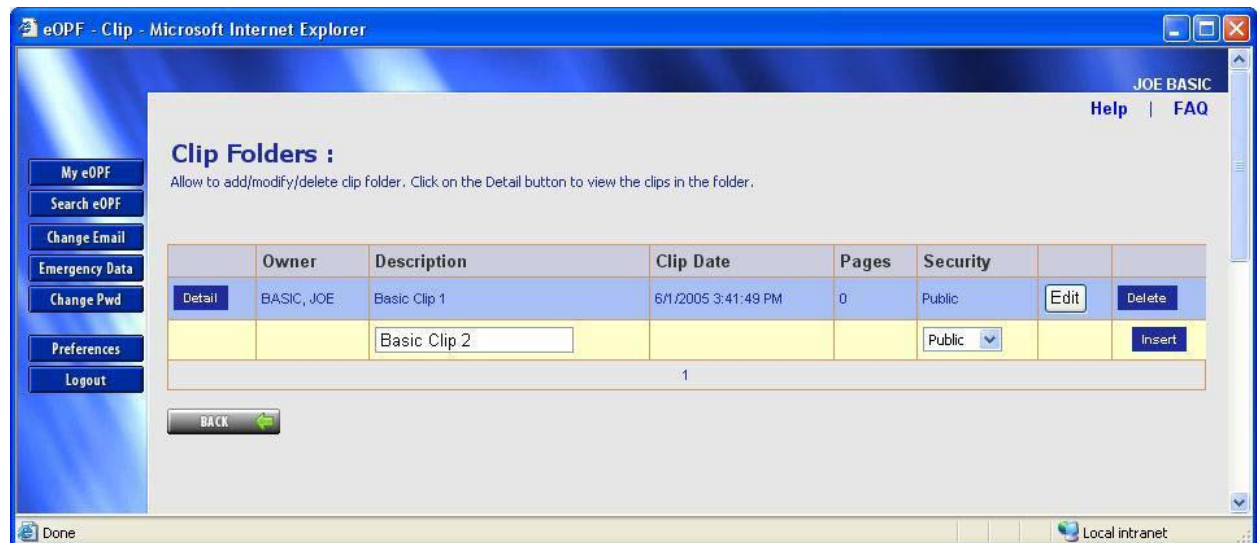
eOPF provides the ability to paper clip documents from the same folder together. eOPF paper clipping allows an employee or an HR Specialist to select individual pages within a document or entire documents for clipping.



A paper clip can be classified as **public** or **private**, with the system defaulting to public. Any user accessing the selected folder can view a public paper clip. ONLY the user that created the paper clip, a system administrator, or an HR Specialist can view a private clip.

## Creating a Paper Clip

The first step in using the paper clip is creating a new paper clip for a folder:


1. Perform a search for the desired folder(s) using the **Search Folders** page. The **Folder** page displays.
2. From the Folder page, click the  **Clip Folder** icon for the desired folder. The **Clip Folders** page opens.

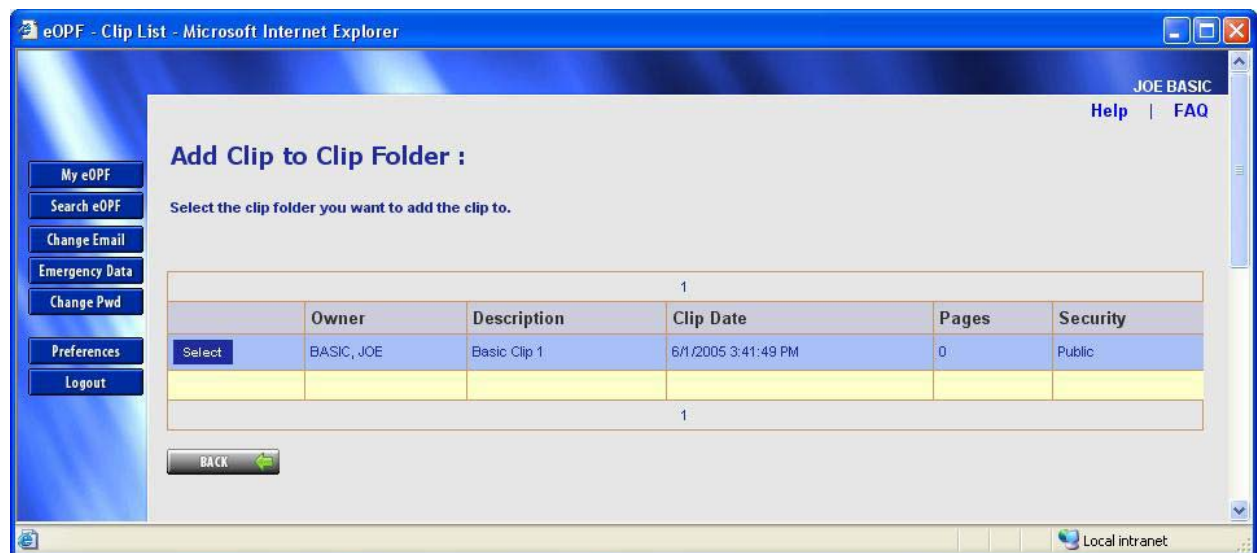




3. Enter a description for the paper clip in the **Description** field, such as FEHB documents or retirement documents.
4. In the **Security** field, select either **Public** or **Private** based on your needs.
5. Click the  **Insert** button.
6. Click the  **Back** button to return to the search result list.

Once a folder has a **Clip Folder**, documents can be added to the Clip Folder at any time.

### To Add Documents to a Clip Folder:

1. Search for the document within the folder you wish to paper clip. The **Results List** page displays.
2. If this is not your own folder, you must select the reason for accessing a document from the **Reason** drop-down list.
3. On the Results List page, click the appropriate  **Add Clip** icon to add a document to the clip. The **Add Clip Folder** page appears.



4. Click the  **Select** button to add the clip to the clip folder. The **Add Page to Clip Folder** page appears.
5. Select the additional pages you want to add to the clip by checking the Add Page to Clip checkbox under each page you want in the Clip Folder, and then click the  **Submit** button. The Results List page reappears.

NOTE: Click the **Back** button to return to the previous page.


### Viewing documents within a Paper Clip

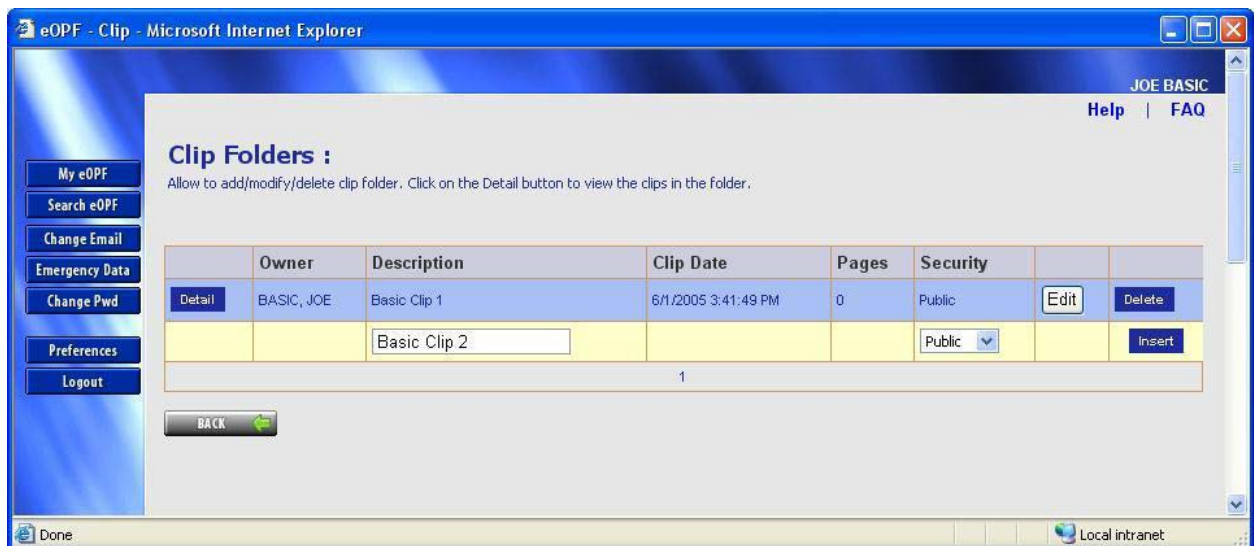
Once a paper clip has been created and populated with associated documents, you can view a list of the documents and open the documents.


### To View Documents Contained within a Paper Clip:

1. Search for the desired folder(s) using the **Search Folders** page. The **Folders** page displays.




- From the **Folder** page, select the reason for accessing the document from the **Reason** drop-down list.
- Click the  **Clip Folder** icon. The **Clip Folders** page appears.



- Click the  **Detail** button next to the desired paper clip. The **View Clip Folder** page appears.



5. Click the  **View Doc** icon to view the desired document within the clip. The document appears.

Refer to your User Guide pages 103-115 for more information on eOPF paper clips, including how to remove documents from a paper clip.

## Chapter 7: Adding Documents

eOPF provides the ability to manually add new documents into the system by either scanning paper documents or importing other electronic files into the database.

## Scanning Documents into eOPF


Users can add new documents into the system via scanning. Before paper documents are scanned, there are some preparation steps that must be performed.

### Preparing Documents

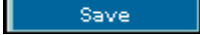
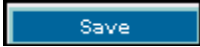

- All staples or other metal fasteners must be removed
- Odd-sized documents and poor quality original documents should be either photocopied or reduced
- Any folds or irregularities should be straightened

### Scanning document(s)

Directions for single-sided and double-sided documents vary slightly, so be sure to refer to the correct set of instructions in your User Guide, pages 60-64. In this lesson, we will cover single-sided scanning.

1. Search for the folder where the new document belongs using the eOPF **Search Folders** page. From the **Folder** page, select the **Reason** from the drop-down list for working on the selected folder.
2. Click the **Add Doc** button from the **Folder** page.
3. Place the document in the scanner (our scanners have both a flatbed and a feeder. For one-sided scanning, place your document face down on either. For double-sided documents, use the feeder only.)
4. After the scanning interface opens, click **Scan**.
5. Select the following options:
  - Verify ISIS checkbox is selected
  - Show Scanner Interface - keep unchecked
  - Form Feeder Multiple Pages - click if doing duplexand then click on the  **OK** button. Select the appropriate scanner from the **Source** dialog box and click the **Select** button. The document appears. If the document is upside-down, right click and choose option

to rotate, etc. Document can be magnified at this point and can also be annotated.



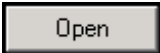
6. Click the  **Save** button. The **Document Info** dialog box appears. The SSN field will already contain the SSN of the selected folder. The first and last name fields will also pre-fill.
7. From the **Form** drop-down list, select the appropriate **Form Name**.
8. From the **Type** drop-down list, select the appropriate **Form Type**.
9. In the Folder area, select the checkbox representing the folder section (Left Side, Right Side) in which the document will reside. eOPF defaults to the folder notes in the forms index.
10. In the **Effective Date** field, select the appropriate effective date of the document from the calendar.
11. Click the  **Save** button. The scanning application closes and returns you to eOPF.
12. Verify the information is accurate, and then click **Yes**. A confirmation box appears.
13. Click the  **OK** button, then click **Close**. A confirmation box appears.
14. Click **Yes**.





For information on scanning double-sided documents and other scanning functions, refer to pages 57-64 in your User Guide.

## Importing Electronic Documents Into eOPF

eOPF has the capability to import electronic files. Documents in electronic format (image, Word, PDF) can be added to an eOPF folder.


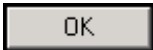

### To Import an eOPF Document:

1. Search for the employee eOPF for the new document.
2. Select a Reason for viewing the document.
3. Click the  **Add Document** icon.
4. Click the  **Open** button.
5. Select the desired file and click the  **Open** button. The selected file appears.

6. Click the  **Save** button. The **Document Info** dialog box appears. The first name, last name, and SSN will be pre-filled based on the SSN of the selected folder.
7. Enter the appropriate information:
- Form the **Form** drop-down list.
  - From the **Type** drop-down list.
  - Select the **Folder** side the document will reside.
  - Complete the **Effective Date** field.
8. Click the  **Save** button.
9. Verify the information is accurate, then click **Yes**. A confirmation box appears.
10. Click the  **OK** button.
11. Click the  **Close** button.
12. Click **Yes**.

Sometime you may need to add a missing page to an electronic document.

#### **To Import a New Page Into an Existing eOPF Document:**

1. Retrieve and open the desired eOPF document.
2. Select a Reason code for viewing the document.
3. Click the  **Modify Doc** icon.
4. Click the **Import** button. A confirmation pop-up box appears.
5. Click **Yes**. The **Page Import** dialog box appears.
6. Select the desired document, and then click the  **OK** button. A confirmation box displays - "**New Page was successfully imported.**"
7. Click the  **Close** button. A **Close Document** confirmation box appears.

For additional information on importing electronic documents in eOPF see your User Guide, pages 65-69.

# Chapter 8: Working with eOPF Reports

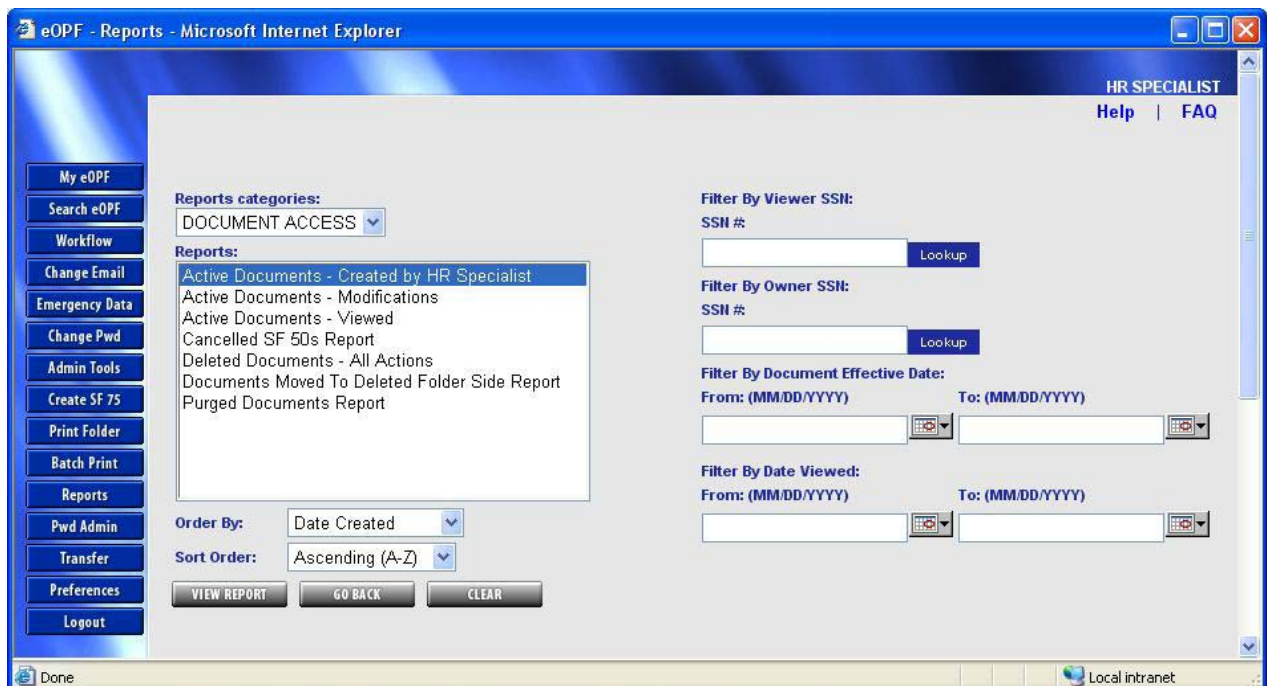
The eOPF system allows HR specialists and eOPF administrators to view, print, and export standardized reports. The reports are real time data analysis of eOPF users, records, and system usage. The eOPF system administrator will create and define the various reports HR specialists can access.


There are three major report groups: Document Access, System Access, and System Integrity. Document Access reports list types of actions taken on eOPF documents, by who, and when. System Access reports detail system access. System Integrity reports verify data integrity if there is a system or hardware failure or some system threat. Requests for any additional reports will go through our eOPF system administrator.

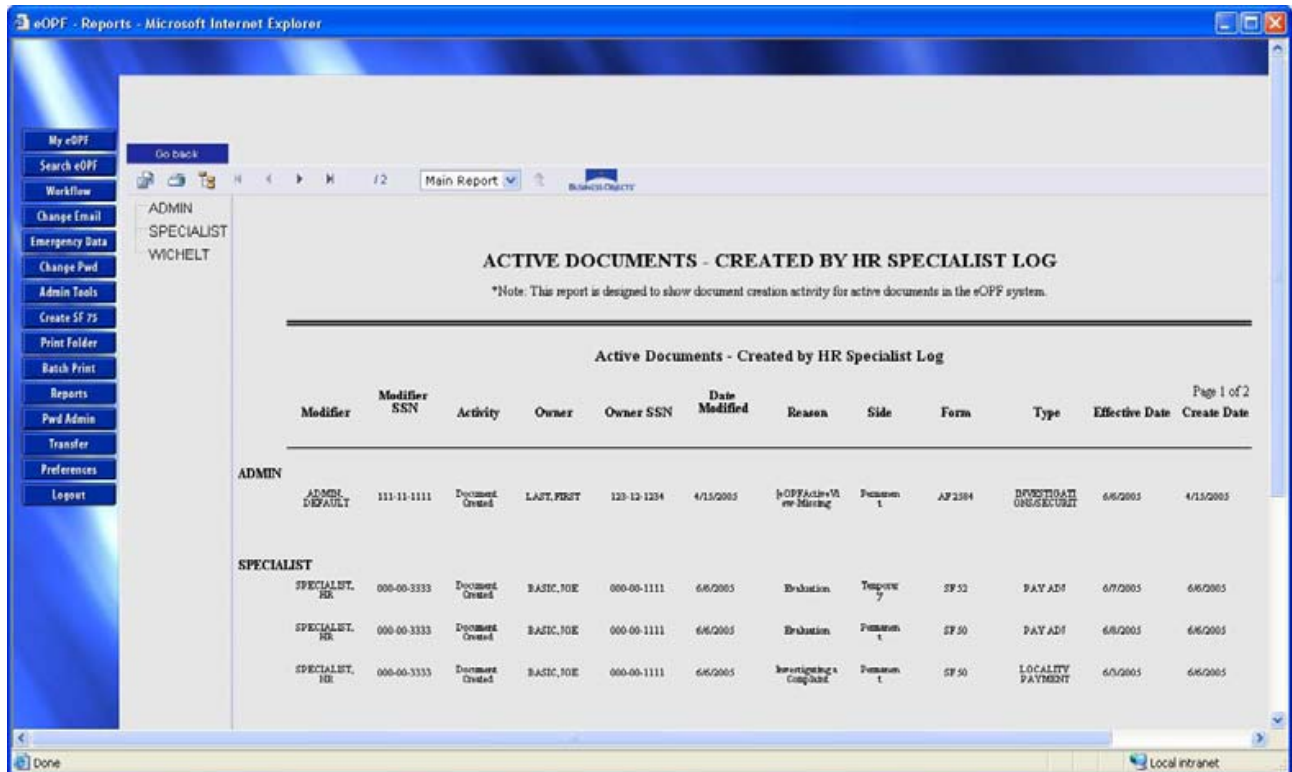
## Viewing and Printing Logs and Reports

HR Specialists may view and print reports on demand. The procedure is the same for viewing all of the reports.

1. Click the  **Reports** button. The Reports page appears.




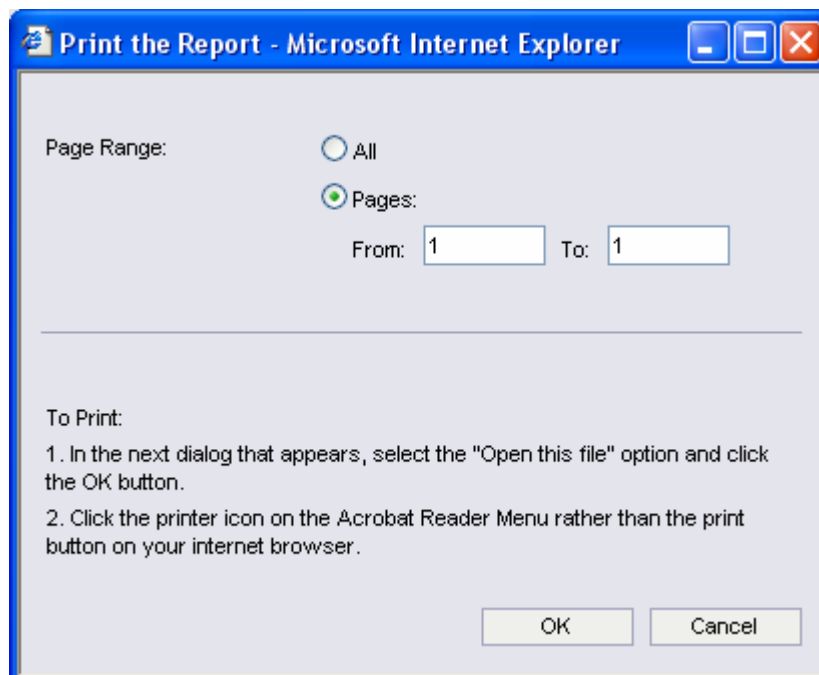
2. Select a Report Category, the desired Report, and input Report filters.
3. Click the  View Report button. The Report appears.




The screenshot shows a web browser window titled "eOPF - Reports - Microsoft Internet Explorer". The left sidebar contains a menu with options: My eOPF, Search eOPF, Workflow, Change Email, Emergency Data, Change Paid, Admin Tools, Create SF 75, Print Folder, Batch Print, Reports, Paid Admin, Transfer, Preferences, and Logout. The main content area displays the "ACTIVE DOCUMENTS - CREATED BY HR SPECIALIST LOG" report. A note states: "\*Note: This report is designed to show document creation activity for active documents in the eOPF system." The report title is "Active Documents - Created by HR Specialist Log". The report is a table with columns: Modifier, Modifier SSN, Activity, Owner, Owner SSN, Date Modified, Reason, Side, Form, Type, Effective Date, and Create Date. The table is divided into two sections: ADMIN and SPECIALIST. The ADMIN section shows a single row for "ADMIN DEFAULT" with a "Document Created" activity. The SPECIALIST section shows three rows for "SPECIALIST HR" with "Document Created" activities. The table is on page 1 of 2.

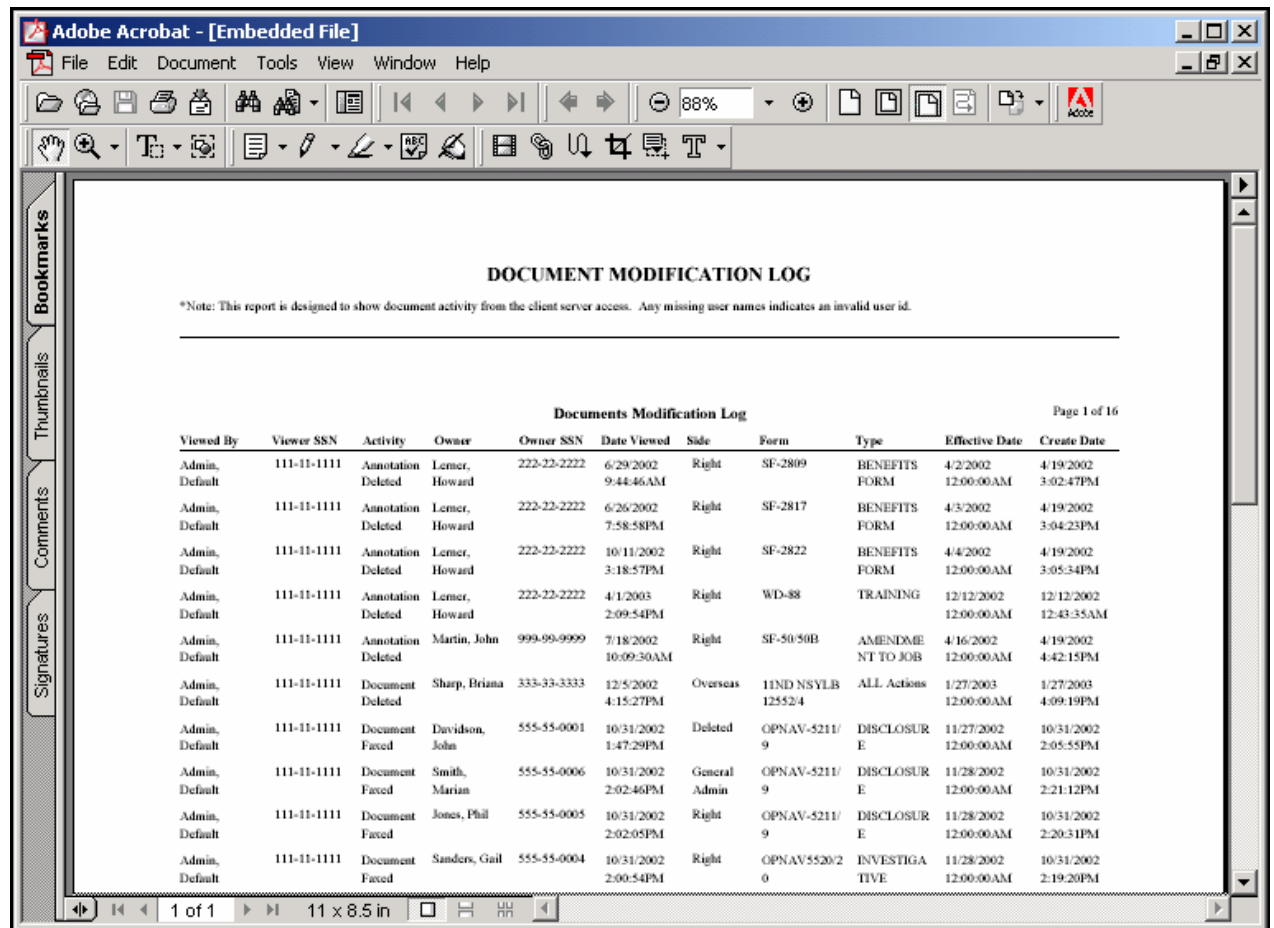
Modifier	Modifier SSN	Activity	Owner	Owner SSN	Date Modified	Reason	Side	Form	Type	Effective Date	Create Date
ADMIN ADMIN DEFAULT	111-11-1111	Document Created	LAST, FIRST	123-12-1234	4/15/2005	eOPFActive/VS or-Mining	Personnel	AF2584	INVESTIGATIVE UNSUBSUSPECT	6/6/2005	4/15/2005
SPECIALIST SPECIALIST HR	000-00-3333	Document Created	BASIC, JOE	000-00-1111	6/6/2005	Evolution	Temporary	SF 52	PAY ADJ	6/7/2005	6/6/2005
SPECIALIST SPECIALIST HR	000-00-3333	Document Created	BASIC, JOE	000-00-1111	6/6/2005	Evolution	Personnel	SF 50	PAY ADJ	6/6/2005	6/6/2005
SPECIALIST SPECIALIST HR	000-00-3333	Document Created	BASIC, JOE	000-00-1111	6/6/2005	Investigative Complaint	Personnel	SF 50	LOCALITY PAYMENT	6/3/2005	6/6/2005


4. Click the  **Print** button. The **Print Report** page appears.

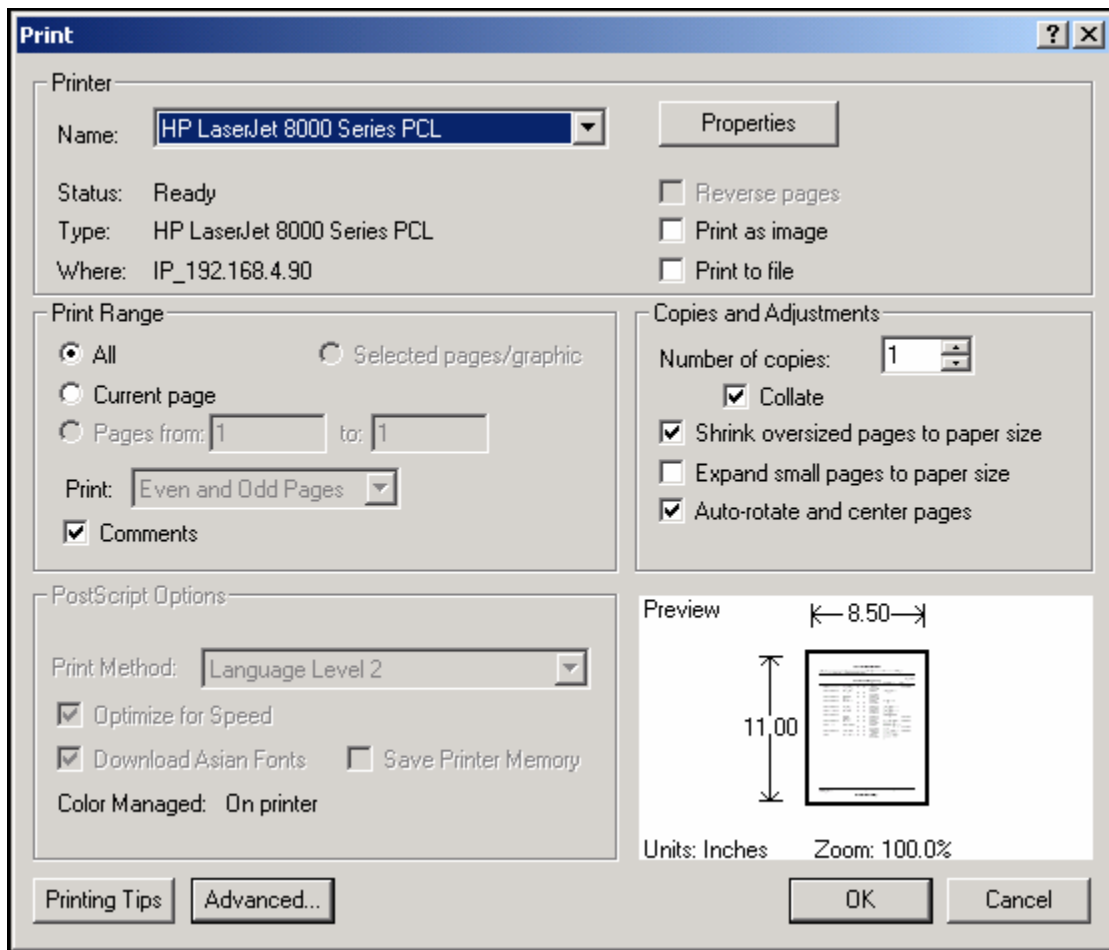


The screenshot shows a dialog box titled "Print the Report - Microsoft Internet Explorer". It contains a "Page Range:" section with two radio buttons: "All" and "Pages:". The "Pages:" radio button is selected. Below it, there are input fields for "From:" and "To:", both containing the number "1". Below the input fields, there is a "To Print:" section with two numbered instructions: "1. In the next dialog that appears, select the 'Open this file' option and click the OK button." and "2. Click the printer icon on the Acrobat Reader Menu rather than the print button on your internet browser." At the bottom right, there are "OK" and "Cancel" buttons.

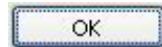
5. Select **All** or a group of pages to print, and click the  OK button. The report appears as a PDF document.



6. Click the  Print button. The **Print** setting box appears.



7. Select the desired print parameters; click the OK button.




## Exporting Logs and Reports


The eOPF system allows HR users and eOPF administrators to export the logs and reports. The same procedure is used for all of the reports.

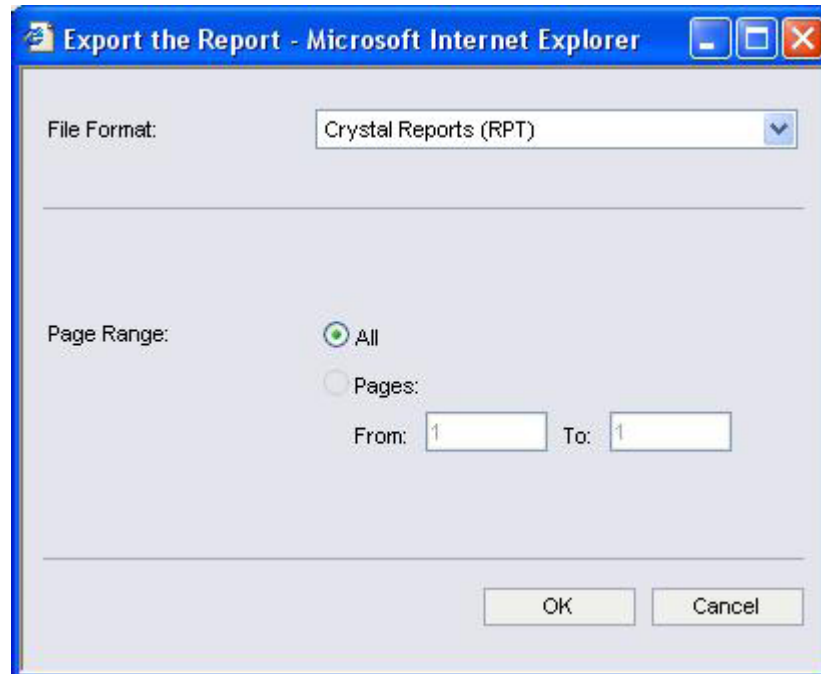
### To export logs and reports:

1. Click the  **Reports** button located on the left-side menu. The **Reports** page appears.

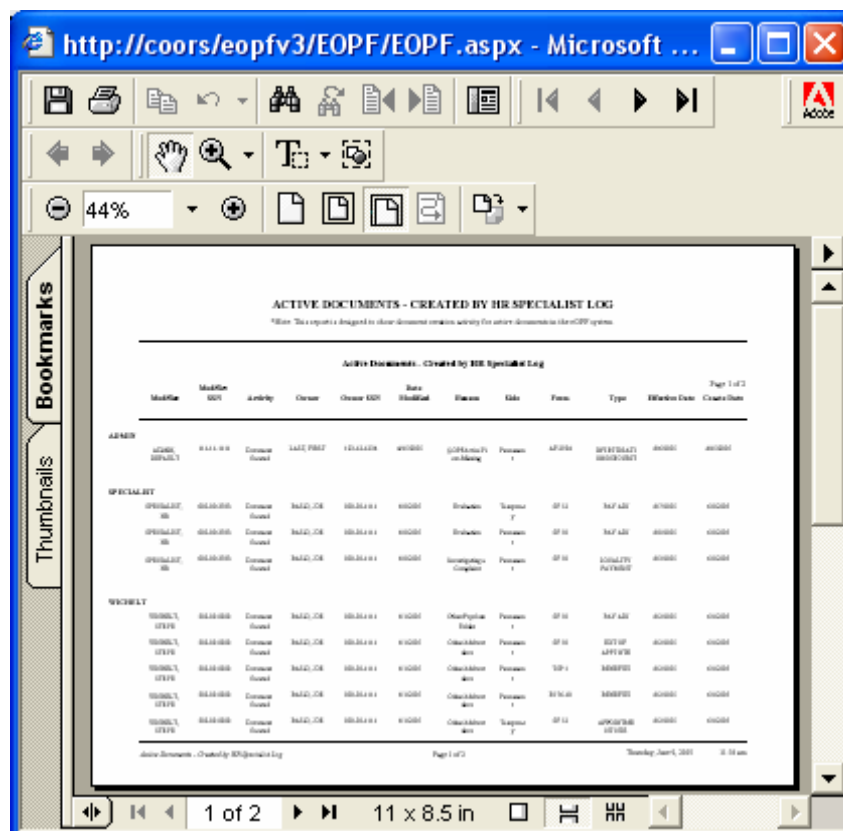
2. Select the **Report Category**, the desired **Report**, and enter report filters.
3. Click the  **View Report** button. The **Report** appears.

Modifier	Modifier SSN	Activity	Owner	Owner SSN	Date Modified	Reason	Side	Form	Type	Effective Date	Create Date
ADMIN ADMIN DEFAULT	111 11 1111	Document Created	LAST, FIRST	123 12 1234	4/15/2005	eOPF Active View-Moving	Personnel	AF 2584	DISPOSITION ON SECURITY	6/6/2005	4/15/2005
SPECIALIST SPECIALIST, JOE	000-00-3333	Document Created	BASIC, JOE	000-00-1111	6/6/2005	Evolution	Temporary	SF 52	PAY ADJ	6/7/2005	6/6/2005
SPECIALIST SPECIALIST, JOE	000-00-3333	Document Created	BASIC, JOE	000-00-1111	6/6/2005	Evolution	Personnel	SF 50	PAY ADJ	6/6/2005	6/6/2005
SPECIALIST SPECIALIST, JOE	000-00-3333	Document Created	BASIC, JOE	000-00-1111	6/6/2005	Investigative Compliance	Personnel	SF 50	LOCALITY PAYMENT	6/3/2005	6/6/2005

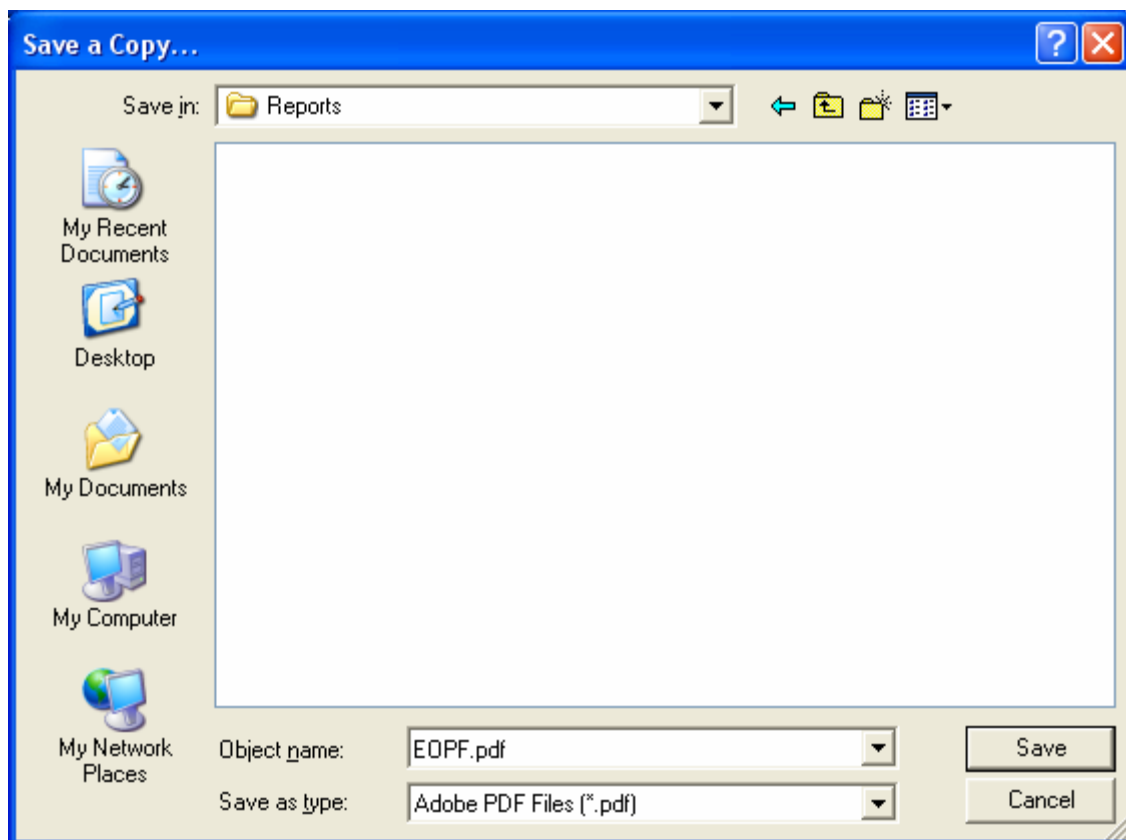
4. Click the  **Export** button displayed on the report. The **Export Report** page appears.

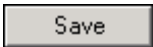


5. Select the report format, and click the OK button. The **Report** appears in the selected format.



6. Select **File→Save As**. The **Save As** pop-up box appears.



7. Type the desired document **Name**, and then click the  **Save** button.